

Technology Planning for Public Libraries

From the Missouri State Library
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State of Missouri

Technology Planning Guidelines for Missouri Public Libraries

- A Technology Planning guide, developed by the Missouri State Library, is available at

http://www.sos.mo.gov/library/certifications/Technology_Planning_Guidelines.pdf

- This presentation includes two methods of creating a Technology Plan, either form is acceptable; however, we would like to encourage you to try TechAtlas due to its on-line nature:
 - Writing a new technology plan from scratch or based on a past plan
 - Using TechAtlas to create a Technology Plan

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What Is a Technology Plan?

- A technology plan allows you to prioritize and to budget for the technology tools needed to meet the mission of your library
- It should take into consideration current and evolving technologies

Why Plan?

- Use technology effectively to further your mission
 - To better serve your community
 - Be proactive in assessing technology needs
 - Justify and prioritize the use of technology in your library
- Obtain funding support
 - LSTA, E-Rate, Other Sources
 - Build ownership in the library with outside partners

Why Plan? Continued

- Know your needs
 - Make informed decisions
 - Purchase the correct equipment
 - Save money
- Use staff time more effectively
 - Put systems in place that are useful tools
 - Determine training needs
 - Avoid crises

Required Forms

There are two forms that are required no matter how the Technology Plan is processed (composed in-house or by using TechAtlas)

- Technology Plan Update Form
 - Indicating this is a NEW plan even if it is based on your last approved plan
- Certification of Compliance
 - CIPA Filtering

Written Plan Elements

1. Title Information

- Library Name
- Technology Plan Contact Person
- Dates Covered in the Plan
- Creation Date of the First Draft
 - Should be prior to December 1
- Date Revised, If Applicable

Written Plan Elements

2. Library's Mission Statement

- Why you exist
- Who you serve
- What you value

Written Plan Elements

3. Demographics of the Public Library System or Public Library

- Identify the size of the service area
- Identify key demographic factors
- [http://www.sos.mo.gov/library/demographics.a
sp](http://www.sos.mo.gov/library/demographics.asp)

Written Plan Elements

4. Identify Your Technology Planning Team

- Technology decision makers
- Technology planning committee
 - Include representatives of those affected by technology decisions

Written Plan Elements

5. Identify Your Technology Vision, Goals, and Strategies

- Vision: An image of the future you seek to create with technology supporting the mission
- Goals: The end points or benchmarks to meet
- Strategies: Your plan to reach your goals and achieve your vision
- Actions: Steps to take to implement the strategies

Written Plan Elements

- Sample Technology Vision Statement

The technology vision of the Pleasant Public Library is that technology will support and empower library staff in providing exemplary customer service and will provide easy, equitable access to materials and services for all clients.

Written Plan Elements

6. Staff training

- To manage the infrastructure
- To utilize the content
- To use new equipment and software

Written Plan Elements

7. Technology Inventory

- Identifies the current level of technology in the library
 - Give a brief description of the network
 - Include hardware and software
 - Indicate operating systems for computers
 - Be sure to include your automation system
 - List assistive technologies

Written Plan Elements

8. Needs Assessment

- Technology assessment
 - Evaluates your current state of technology in relation to current technology plan—Did we reach our goals set three years ago?
- Future technological needs
 - For the public
 - For the staff
- Prioritizes results

Written Plan Elements

9. Budget

- Budgets allow you to
 - Identify and set technology priorities
 - Establish planning parameters and guidelines
 - Appropriately allocate and distribute library funds
 - Foster awareness of financial needs and requirements of technology in your library

Technology Made Simple, page 92

Written Plan Elements

9. Budget

- Include the library's projected operating budget
 - Identify costs (expenditures)
 - Identify funding sources (income)

Written Plan Elements

- Budgets should provide anticipated technology expenditures for the next three (3) years
- Provide evidence of adequate budget to support infrastructure and services over the next three years
- Identify existing and potential funding sources

Written Plan Elements

10. Implementation Plan

- Basic schedules and timelines
- Budget commitments
- Equipment to purchase
- Staff assignments
 - Trainings to be pursued

Written Plan Elements

10. Implementation Plan

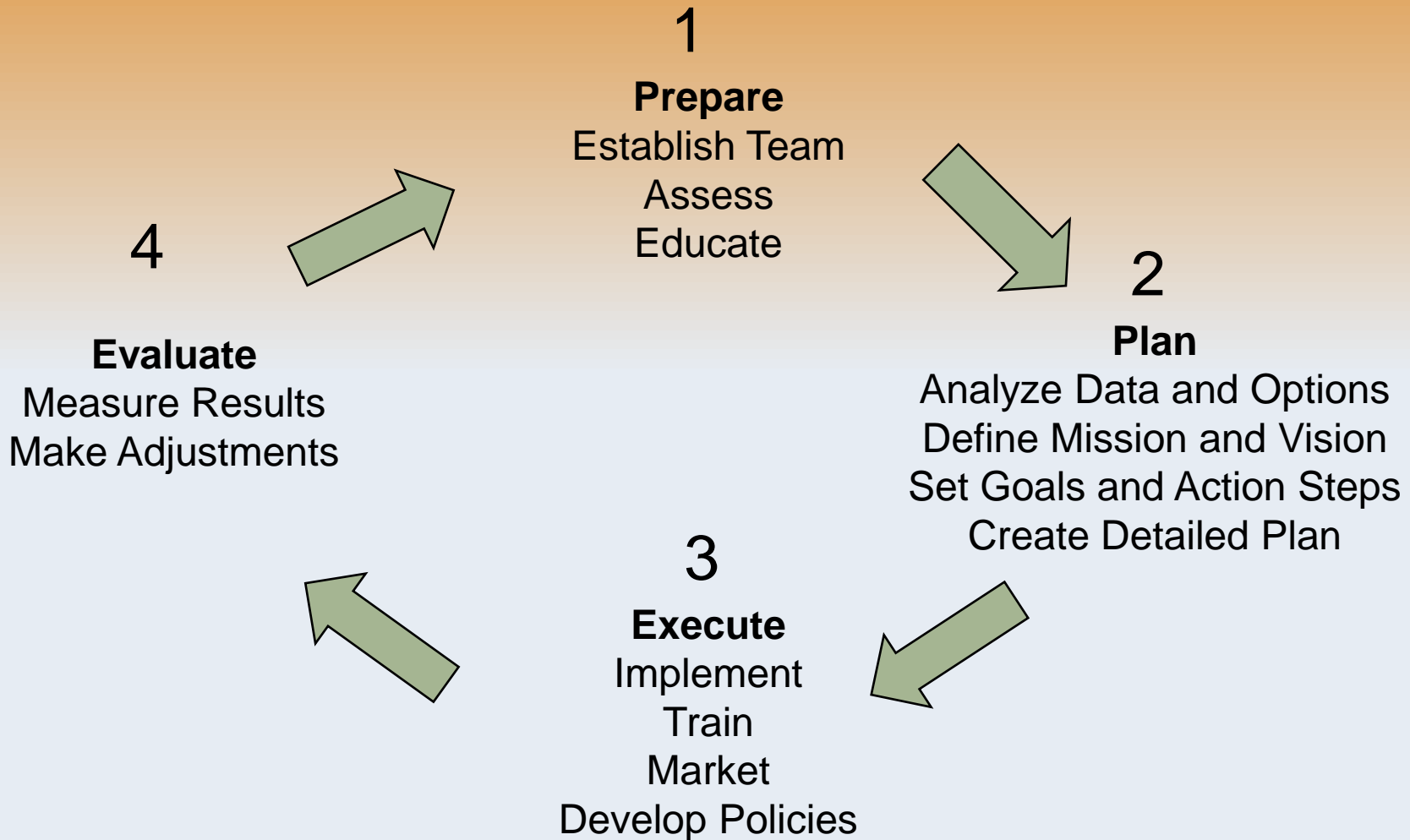
- Communicate with all stakeholders
- Periodic evaluation of progress

Written Plan Elements

11. Evaluation of Overall Plan—Periodic Review

- Monitor progress toward specific goals and overall goals
- Respond to new situations
- Assess new technologies
- Occurs at least annually

The Planning Life Cycle



Using Technology Planning Resource Tools

- TechAtlas for Libraries
 - An free online tool from WebJunction
 - A recorded overview is available at
<http://webjunction.org/do/Navigation?category=13408>

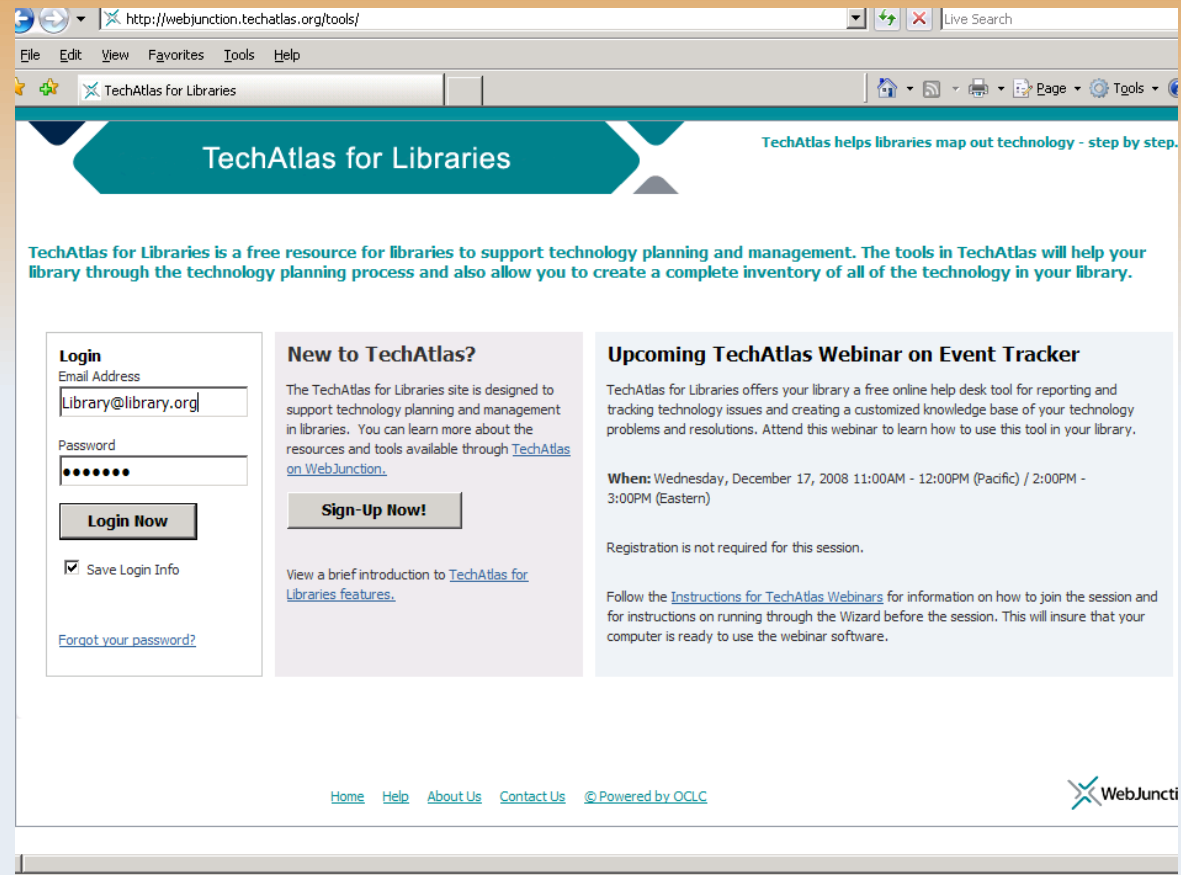
Why use TechAtlas Technology Planning?

- The data is stored off-site that satisfies good business practice for disaster planning
- The software provides a step-by-step process making technology planning very easy
- TechAtlas is free to use for public libraries
- TechAtlas provides a well-organized, consistent technology plan layout
- The Technology Plan document is readily accessible and can easily be kept up to date
- Most libraries have already entered their computer inventory into TechAtlas

TechAtlas—Step-by-Step

<http://webjunction.techatlas.org/tools/>

- Log into TechAtlas using your library's user ID (email address) and password
- Click on the Login Now button



The screenshot shows a web browser window with the address bar displaying <http://webjunction.techatlas.org/tools/>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page title is "TechAtlas for Libraries". The main heading is "TechAtlas for Libraries" in a teal banner. Below the banner, a teal arrow points right with the text "TechAtlas helps libraries map out technology - step by step." The main content area has a teal background with white text: "TechAtlas for Libraries is a free resource for libraries to support technology planning and management. The tools in TechAtlas will help your library through the technology planning process and also allow you to create a complete inventory of all of the technology in your library." There are three main sections: 1. Login: A form with "Email Address" (containing "Library@library.org") and "Password" (containing six dots). A "Login Now" button is below the form. A checkbox "Save Login Info" is checked. A link "Forgot your password?" is at the bottom. 2. New to TechAtlas?: A section with a "Sign-Up Now!" button. Text below says: "The TechAtlas for Libraries site is designed to support technology planning and management in libraries. You can learn more about the resources and tools available through [TechAtlas on WebJunction](#)." A link "View a brief introduction to [TechAtlas for Libraries features](#)." is at the bottom. 3. Upcoming TechAtlas Webinar on Event Tracker: A section with text: "TechAtlas for Libraries offers your library a free online help desk tool for reporting and tracking technology issues and creating a customized knowledge base of your technology problems and resolutions. Attend this webinar to learn how to use this tool in your library." Below this, it says "When: Wednesday, December 17, 2008 11:00AM - 12:00PM (Pacific) / 2:00PM - 3:00PM (Eastern)". A note says "Registration is not required for this session." At the bottom, it says "Follow the [Instructions for TechAtlas Webinars](#) for information on how to join the session and for instructions on running through the Wizard before the session. This will insure that your computer is ready to use the webinar software." The footer has links: Home, Help, About Us, Contact Us, and "© Powered by OCLC". The WebJunction logo is in the bottom right corner.

Planning—Step 1

Either click the Planning item in the table or the gray “Planning” tab

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Home Planning Survey Inventory Tools & Reports

Get Started About Us

Home

Select a link below to visit one of the functional areas of TechAtlas. If you're brand new to TechAtlas, visit the [Get Started](#) page for a suggested sequence of steps.

Tasks do not have to be performed in any strict order, so feel free to explore! You can use the checkboxes to the left of each of the functional area listed below to designate which areas you have successfully completed.

Get Started	Use the Get Started link to learn more about using TechAtlas
<input type="checkbox"/> Planning	Create a technology plan for your library.
<input type="checkbox"/> Survey	Interactive assessments to help you establish objectives for your technology plan.
<input type="checkbox"/> Inventory	Gather details on your existing technology assets.
Tools & Reports	Useful tools for learning more about your existing technology assets.

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Plan Years—Step 2

Notice the topics in the left column are repeated in the green bar for easy navigation

Click on either entry
for Plan Years

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Home **Planning** Survey Inventory Tools & Reports

Plan Years Team Mission & Vision Goals & Objectives Professional Development Budget Evaluate Policies Download Technology Plan

Planning

Use the links on this page to set the foundations of your library technology plan. [Describing your Mission](#) is a great place to start - the library's mission statement should drive everything that you hope to accomplish with technology.

Plan Years		Specify the years that this technology plan will cover
Assemble your Team	Last Updated: 9/10/2008	to communicate to planning team members including: Jean.Morrison@sos.mo.gov, Katina.Jones@sos.mo.gov, Barbara.Reading@sos.mo.gov
Describe your Mission & Vision	Last Updated: 9/10/2008	The Mission of the State Library is:
Goals and Objectives		You have created 3 goals.
Professional Development		Describe how your library will handle professional development needs for technology.
Budget	Last updated 9/10/2008	Enter budget details for your goals.
Evaluate	Last updated 9/10/2008	Add steps to evaluate the overall progress in you technology plan. You can also enter evaluation steps for each objective in you plan in the Goals and Objectives section.
Policies		Add links or downloadable copies of relevant technology policies.
Download Technology Plan		Download a copy of your technology plan.

Select the Plan Years

Use the drop-down box to select the current year, then key in the Start Date (July 1, 20XX) and End Date (June 30, 20XX) Circled below

Click the Add Button

The current plan years populate the gray bar

Note the Active checkbox and the Edit and Delete buttons that can be used to edit or remove the entries so you can enter the next plan years

Click on the Planning tab

To return to the list **or** click on the Team item in the green bar to move to the next option—selecting your Tech Planning team

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Plan Years Team Mission & Vision Goals & Objectives Professional Development Budget Evaluate Policies Download Technology Plan

Plan Years

This section will allow you to specify which years this technology plan will cover. Select a year from the drop down menu and then you optionally choose to specify the actual start date and end date of this planning year. For example if your library considers Planning Year 2009 to run from July 1, 2008—June 30, 2009, you can specify that. This is to help accommodate users that work with both calendar years and fiscal years. If you choose to enter the optional start and end dates for your calendar years, those dates will display and print out at the top of the technology plan when it is downloaded.

- [E-rate Applicant Tip](#)
- [Help](#)

The Plan Years will be also be important in the Budgeting section of TechAtlas. E-rate applicants, please review the tips for this page for details about how funding year information is especially important for your planning process.

Year: 2006 Start Date (mm/dd/yyyy): End Date (mm/dd/yyyy): **Add**

Active?	Plan Years	Start Date	End Date	
<input checked="" type="checkbox"/>	2009	7/1/2009	6/30/2012	Edit Delete

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Technology Planning Team—Step 3

Enter the Plan Leader's name in the top box

Enter the Plan Leader's e-mail address in the second box

Enter the e-mail addresses of the other team members in the large box at the bottom

Click the Save button

You can change these items at any time

Note the “Webjunction Article: Building a Technology Team” in the right panel that you can select for advice on selecting team members

The screenshot shows a web application interface for creating a technology planning team. At the top is a navigation bar with tabs: Home, Planning (selected), Survey, Inventory, and Tools & Reports. Below this is a sub-navigation bar with links: Plan Years, Team (selected), Mission & Vision, Goals & Objectives, Professional Development, Budget, Evaluate, Policies, and Download Technology Plan. The main heading is "Team". Below the heading is a paragraph explaining the purpose of the team. To the right of this paragraph is a list of links: "WebJunction Article: Building a Technology Team" and "Help". The main content area is titled "Identify Your Technology Team Members" and contains three input sections. The first section is "Plan Leader" with a text box and an example: "Jane Doe. The plan leader may be the staff member most interested in the use of technology at your library, or a person assigned to lead the effort." The second section is "Plan leader e-mail address" with a text box and an example: "Jane@ourlibrary.org. Including the plan leader's e-mail address allows TechAtlas to send reminders to the plan leader as appropriate." The third section is "Technology planning team e-mail addresses" with a large text box and an example: "Jane@nonprofit.org; Boardmember@nonprofit.org; ProgramPerson@nonprofit.org. Separate e-mail addresses with a comma or a semi-colon. TechAtlas includes features that can send e-mail reminders to team members if you include their addresses here." At the bottom left of the form is a "Save" button.

Home Planning Survey Inventory Tools & Reports

Plan Years Team Mission & Vision Goals & Objectives Professional Development Budget Evaluate Policies Download Technology Plan

Team

Build a team that includes voices from a broad spectrum of program and activity areas. Finding the right mix of board members, staff, volunteers, and others will help shape a technology plan that supports your library's mission and will be successfully implemented.

- [WebJunction Article: Building a Technology Team](#)
- [Help](#)

Identify Your Technology Team Members

Plan Leader

Plan Leader Example:
Jane Doe
The plan leader may be the staff member most interested in the use of technology at your library, or a person assigned to lead the effort.

Plan leader e-mail address

Leader e-mail example:
Jane@ourlibrary.org
Including the plan leader's e-mail address allows TechAtlas to send reminders to the plan leader as appropriate.

Technology planning team e-mail addresses

Technology planning team e-mail example:
Jane@nonprofit.org; Boardmember@nonprofit.org; ProgramPerson@nonprofit.org
Separate e-mail addresses with a comma or a semi-colon. TechAtlas includes features that can send e-mail reminders to team members if you include their addresses here.

Save

Mission and Vision Statements—Step 4

Click on Mission & Vision in the green navigation bar or click on the Planning tab then “Describe your Mission & Vision”

If you already have a Mission Statement, copy it from your document and paste it in the box

Click the Save button below the box

If you have a Vision statement, copy and paste it in the Vision box

Click the Save button below that box

Click “Goals & Objectives

Note the help articles if you do not have a mission or vision statement

Home Planning Survey Inventory Tools & Reports

Plan Years Team **Mission & Vision** Goals & Objectives Professional Development Budget Evaluation

Mission and Vision

Mission and Vision statements are great resources to help guide the library through the decision making process. Referring back to these statements can help to reinforce decisions and provide a check for the direction that the library is choosing to take.

MISSION — The mission statement is a written document that describes your library's service priorities. It may help to think of your mission statement as a marketing tool. Your audience is the community that the library serves. Your mission statement should explain in clear and easily understood terms the services the library provides to the community and how the community benefits from those services.

The Mission of the State Library is:

Save

VISION — A vision statement helps guide your technology planning process and reflects a strategy for satisfying your library's mission with support from technology. To begin drafting a vision statement envision the possibilities: If technology were working to help achieve your library's mission, what would this look like?

- [WebJunction Article: Technology Vision Statements](#)
- [WebJunction Article: Writing a Mission Statement](#)
- [Help](#)

A TechAtlas Tip on Goals:

- Good content to remember includes:
- How you assess the needs of your library each year. Do you do surveys, focus groups, team meetings, etc.
- What services/products the library needs to purchase and implement. Be especially clear about making a direct link in your goals to the services you are requesting E-rate reimbursements for. If the library needs a new server—what purpose does it serve and how do you know it is needed?
- Steps that the library will take toward addressing professional development needs of the staff can be expressed as goals and objectives as well. A good way to address this is that whenever new technology needs are being include, create an activity that will address training needs. There is also a field in the Survey tab to cover a general professional development statement.

Setting Library Goals—Step 5

How do you decide on how many goals to create or what you need?

How many? It depends on how expensive the goal will be and how much money the library expects to have to make the purchase. It would be common to have years with none, one, two, or possibly three goals. Chances are more than three goals would be impossible to keep up with!

What do you need? Look to the LSTA Five-year Plan for guidance, such as Page 9-11

“Goal #1: Missouri libraries will provide robust, reliable and secure access to information to meet the needs of all Missourians by utilizing efficient and effective communications and technology capable of reaching the patron at the point of need, promoting good use of staff time, working well within a network environment and able to adapt to technological advances as needed.”

What goals? How many goals? Cost?

- Technology Goals satisfy technology “NEEDS”
 - “Patron Technology Needs”
 - “Staff Technology Needs”
 - “Infrastructure Technology Needs”
- Satisfying goals usually costs money and/or time
- The board, patrons, and staff of the library may offer “needs” suggestions
- Once you have identified the needs, they can be assigned to a goal—see the next sheet showing needs that have been grouped under the Goal: “Provide adequate up-to-date technology for patrons so they are able to access information”
- The next section could be the Goal: “Provide adequate up-to-date technology for staff so they are able to provide quality service to patrons”

Goals Worksheet

Before entering your Goals and Objectives, you might find it useful to organize them in a table format. Remember that Actions are Optional in TechAtlas (you can see why when you examine them below—they can be repetitive). This process may make Goal, Objective, and Actions entry easier. Budgeting cost is also easier to calculate when broken down by goals and objectives. Below shows the top of the “Patron Needs” section.

GOALS/Objectives/Actions Worksheet

Library or Branch Name:						
Need (Patron/Staff/Infrastructure)	Goal is to:	Objectives	Actions (Optional)	Estimated Total Cost	Annual Cost	Year
Patrons need new computers (8)	Provide adequate up-to-date technology for patrons so they are able to access information	Replace 8 old patron computers	Research current computer configuration/prices (approx. date)	\$820 each		2010
			Review/follow Library System purchasing guidelines			
			Enter into purchase agreement (approx. date)			
			Receive purchased equipment (approx. date)			
			Install purchased equipment (approx. date)			
			Train staff			
			Advertise to patrons			
			Total Cost	\$ 6,560.00		
Patrons need access to a faster printer with color printing capability		Purchase 1 network color laser printer	Research current computer configuration/prices (approx. date)	\$ 2,400.00		2011
			Review/follow Library System purchasing guidelines			
			Enter into purchase agreement (approx. date)			
			Receive purchased equipment (approx. date)			

Entering Goals and Objectives in TechAtlas

Key each goal, one at a time in the text box

Click the “**Add New Goal**” button

The goals appear in the area above the text box

When you have the goals keyed in, click the “Add Objectives” button circled on the right

If you need to edit or delete a goal, there are Edit and Delete buttons on the right also

The screenshot shows the TechAtlas interface. At the top is a navigation bar with tabs: Home, Planning (active), Survey, Inventory, and Tools & Reports. Below this is a sub-navigation bar with links: Plan Years, Team, Mission & Vision, **Goals & Objectives**, Professional Development, Budget, Evaluate, Policies, and Download Technology Plan.

The main heading is "Goals and Objectives". Below it is a text block explaining the section's purpose and a link to "E-rate Applicant Tip" and "Help".

Under "Planning Steps", there are three goals listed:

- Goal: 1: To update all staff and patron computers in a 3-year cycle where 1/3 of all computers will be replaced each year.
- Goal: 2: Provide patrons with up-to-date printing capability including at least one color printer.
- Goal: 3: To provide at least two computers with age appropriate software for each age group including Children and Youth/Teens

Each goal has a set of actions: [Edit](#) | [Delete](#) | [Add Objective](#). These action links are circled in green.

At the bottom left, there is a text box and an "Add New Goal" button. An arrow points from the text "Click the 'Add New Goal' button" to this button.

Below the goals is a section titled "Unassigned Objectives" with the text: "Your library currently has no Unassigned Objectives. Objectives can be created by the user or by taking one of the assessments available in TechAtlas. These objectives should eventually be attached to a goal or deleted."

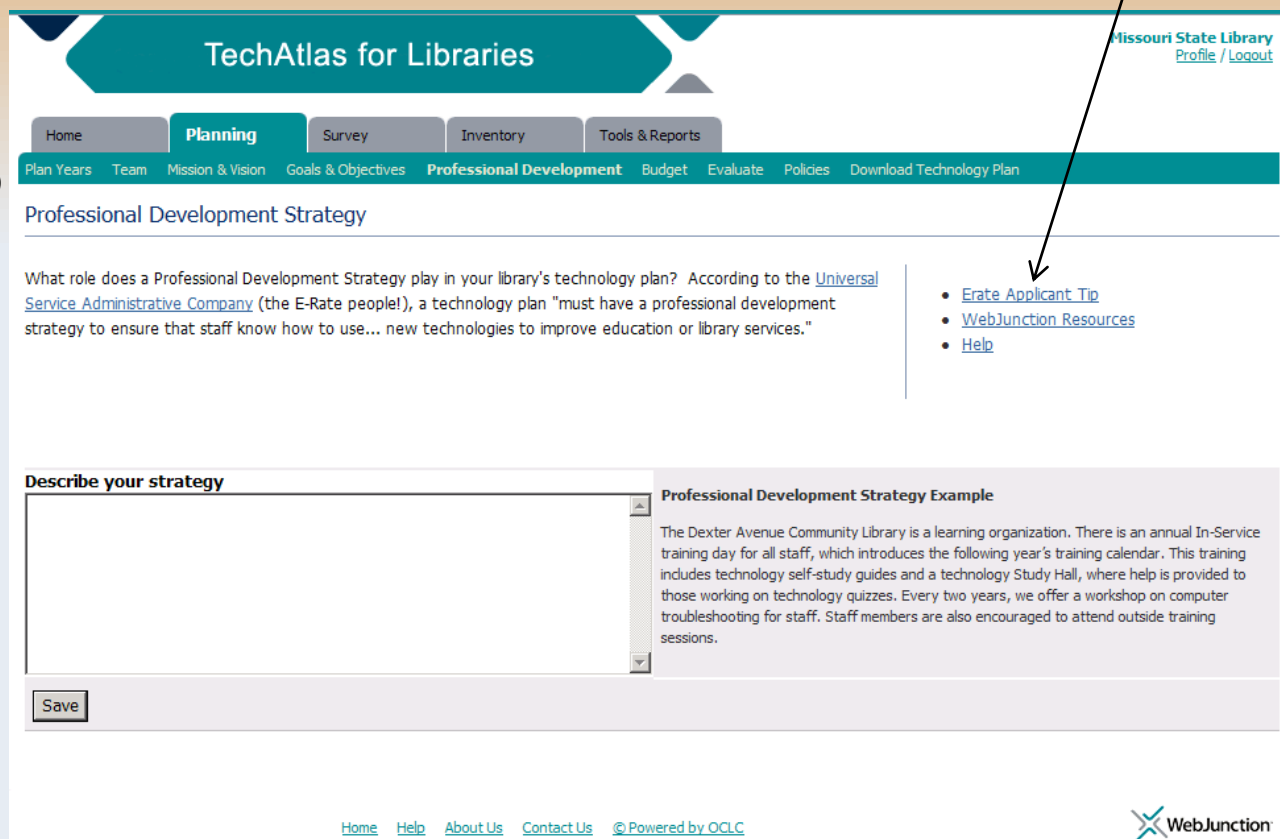
Professional Development—Step 6

- Click on “Professional Development” in the green navigation bar

There may have been Objectives that involved training, but this screen offers the library a place to list the library’s current or planned professional development— such as Conferences regularly attended, in-house training offered (an element of weekly staff meetings?), online training, local training and workshops staff attend

Click the “Save” button

Note the tips!



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Plan Years Team Mission & Vision Goals & Objectives **Professional Development** Budget Evaluate Policies Download Technology Plan

Professional Development Strategy

What role does a Professional Development Strategy play in your library's technology plan? According to the [Universal Service Administrative Company](#) (the E-Rate people!), a technology plan "must have a professional development strategy to ensure that staff know how to use... new technologies to improve education or library services."

- [E-rate Applicant Tip](#)
- [WebJunction Resources](#)
- [Help](#)

Describe your strategy

Professional Development Strategy Example

The Dexter Avenue Community Library is a learning organization. There is an annual In-Service training day for all staff, which introduces the following year's training calendar. This training includes technology self-study guides and a technology Study Hall, where help is provided to those working on technology quizzes. Every two years, we offer a workshop on computer troubleshooting for staff. Staff members are also encouraged to attend outside training sessions.

Save

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Skills Survey

- For ideas on training needs of staff, staff can take skills surveys within TechAtlas
- Click on the “Survey” tab to explore the Professional Development and Technology skills surveys in TechAtlas

The screenshot shows the 'TechAtlas for Libraries' interface. At the top, there's a teal header with the title 'TechAtlas for Libraries' and a link for 'Missouri State Library Profile / Logout'. Below the header is a navigation bar with tabs: 'Home', 'Planning', 'Survey' (which is highlighted), 'Inventory', and 'Tools & Reports'. Under the 'Survey' tab, there are two sub-tabs: 'Professional Development' and 'Technology Skills'. The main content area is titled 'Survey' and contains several paragraphs of text explaining the purpose of the surveys. At the bottom, there are two sections: 'Professional Development Survey' and 'Technology Skills Survey', each with a brief description of the survey's function. A final note at the bottom states that no assessments are currently available for users to take.

TechAtlas for Libraries

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Home Planning **Survey** Inventory Tools & Reports

Professional Development Technology Skills

Survey

Use the functions on this page to identify professional development needs for your library staff.

The Technology Skills survey is a simple survey that can be sent out to staff members to get a basic assessment of their skill levels.

The Professional Development survey is customized by your TechAtlas partners and may look different for different users, the results of the survey are passed on to your TechAtlas partner.

In the past TechAtlas has also made Assessments available to users to help determine technology planning needs. The assessments were getting a bit out of date, so we are temporarily removing them and expect to have new version posted in early 2009, so please remember to check back!

Professional Development Survey	The <i>Professional Development Survey</i> is similar to the <i>Technology Skills Survey</i> (see below), but includes customized content developed by your TechAtlas partners. We recommend comparing the content of the questions in each version of the survey to determine which one (or both) of these tools will best meet your library's needs.
Technology Skills Survey	Use this automated survey tool to get a picture of the current state of technology skills among your staff and/or volunteers. The results of this survey can help inform the professional development strategy for your library by identifying areas where additional training is needed.

No assessments are available for you to take at this time. Please check back again later.

Budget—Step 7

- You may explore the Budget portion of TechAtlas, but if you use a budgeting software or Excel to keep your budget, it is probably more convenient for you to attach a copy of the “Income” and “Expenses” portions from your existing source.
- Just remember to project the budget (income and expenses) out three years.

Evaluation—Step 8

Click on the “Evaluate” item in the green toolbar

- Key in the ways you plan to evaluate the effectiveness of the technical upgrades and training during the three-year span of this Technology Plan
- Click the Add button after each and they will appear as a list at the bottom of the screen
- Once entered, evaluation strategies can be edited or deleted by clicking on the “Edit” or “Delete” buttons

TechnAtlas for Libraries

Home Planning Survey Inventory Tools & Reports

Plan Years Team Mission & Vision Goals & Objectives Professional Development Budget **Evaluate** Policies Download Technology Plan

Evaluation

Create a formal process that will be used to evaluate the progress and methods used in the technology plan. Each objective in the plan can also have individual evaluation components, so this should be focused on the overall review of the planning process.

[View example Evaluation Steps](#)

Add New Evaluation Step:

Current Evaluation Steps

1. Ask Patrons regularly for comments and record them.	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
2. Leave comment cards to be completed by patrons and a box by the door for depositing them.	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
3. Conduct a semi-annual patron survey	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
4. Publish a survey once a year in the local newspaper.	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
5. Request comments in articles published in the newspaper and newsletter.	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
6. Use the evaluation statistics recorded by the library management system.	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Policies—Step 9

Click on the Policies item in the green navigation bar

Policies are usually already written and the documents are saved in-house

Click in the “Policy Name” box and enter the name of the first policy

Click in the “Last Updated” box and enter the date that the policy was last reviewed whether changes were made or not

Click in the “Online Location” and paste the link to your website where policies are stored (if they are displayed on your library’s website)

Click on the Browse button to find the policy file on the server or computer. When you locate the file, click the Add Policy button

The policy will be uploaded to TechAtlas

Note the “Delete” button on the bottom right. This is where you would delete an old policy to upload a new copy of the policy or remove it when it no longer applies

The screenshot shows the 'TechAtlas for Libraries' interface. At the top, there's a navigation bar with 'Policies' highlighted. Below it, a section titled 'Policy Documents' provides examples of library policies and instructions on how to store them. It includes a form to add a new policy with fields for 'Policy Name', 'Last Updated', 'Online location', and 'Upload the policy document'. A 'Browse...' button is used to select a file. Below the form is a table listing existing policies.

Policy Documents - Edit Details	Updated	Location	Download file	Delete
Wireless Use Policy	1/1/2007	http://www.sos.mo.gov		Delete

Downloading Your Technology Plan— Step 10

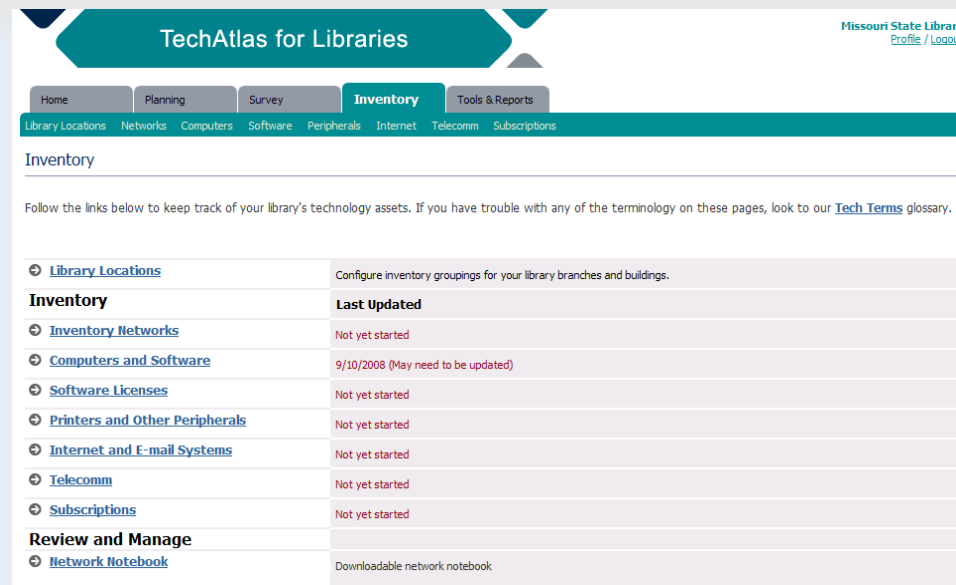
You can click on the “Download Technology Plan” choice in the green navigation bar OR click on the “Planning” tab then on “Download Technology Plan” OR click on the “Tools & Reports” tab, then click on “Downloadable Technology Plan”

The screenshot shows the 'TechAtlas for Libraries' interface. At the top, there's a teal header with the title 'TechAtlas for Libraries' and a link to 'Missouri State Library Profile / Logout'. Below the header is a navigation bar with tabs: Home, Planning, Survey, Inventory, Tools & Reports, and Download Technology Plan. The 'Tools & Reports' tab is circled. Below the navigation bar is a sub-navigation bar with links: Plan Years, Team, Mission & Vision, Goals & Objectives, Professional Development, Budget, Evaluate, Policies, and Download Technology Plan. The 'Download Technology Plan' link is circled. The main content area is titled 'Planning' and contains a list of links for planning a technology plan. The 'Download Technology Plan' link is circled in the list.

Link	Last Updated	Description
Plan Years		Specify the years that this technology plan will cover
Assemble your Team	Last Updated: 9/10/2008	to communicate to planning team members including: Jean.Morrison@sos.mo.gov, Katina.Jones@sos.mo.gov, Barbara.Reading@sos.mo.gov
Describe your Mission & Vision	Last Updated: 9/10/2008	The Mission of the State Library is:
Goals and Objectives		You have created 3 goals.
Professional Development		Describe how your library will handle professional development needs for technology.
Budget	Last updated 12/4/2008	Enter budget details for your goals.
Evaluate	Last updated 9/10/2008	Add steps to evaluate the overall progress in you technology plan. You can also enter evaluation steps for each objective in you plan in the Goals and Objectives section.
Policies		Add links or downloadable copies of relevant technology policies.
Download Technology Plan		Download a copy of your technology plan.

Inventory—Step 11

- Due to the Opportunity Online Hardware Grant, most libraries have used the Inventory module in TechAtlas
- As computers and network hardware are removed and new devices added, be sure to update the Inventory module.
- Click the “Inventory” tab
- Select Computers and Software
- Scroll down the page until Your list is in view and edit or add devices as necessary



The screenshot shows the TechAtlas for Libraries interface. At the top, there's a teal header with "TechAtlas for Libraries" and a "Missouri State Library Profile / Login" link. Below the header is a navigation bar with tabs: Home, Planning, Survey, **Inventory**, and Tools & Reports. Under the Inventory tab, there's a sub-menu with links: Library Locations, Networks, Computers, Software, Peripherals, Internet, Telecomm, and Subscriptions. The main content area is titled "Inventory" and includes a note: "Follow the links below to keep track of your library's technology assets. If you have trouble with any of the terminology on these pages, look to our [Tech Terms](#) glossary." Below this is a table with two columns: a list of categories with expand/collapse icons, and a status column.

	Last Updated
Library Locations	Configure inventory groupings for your library branches and buildings.
Inventory	
Inventory Networks	Not yet started
Computers and Software	9/10/2008 (May need to be updated)
Software Licenses	Not yet started
Printers and Other Peripherals	Not yet started
Internet and E-mail Systems	Not yet started
Telecomm	Not yet started
Subscriptions	Not yet started
Review and Manage	
Network Notebook	Downloadable network notebook

Printing the Technology Plan—Step 12

- Be patient, it may take a few seconds
- Note the download options on the right
- You can download into Word or .rtf format
- You can send it via email
- Once downloaded, you can edit or add to the plan, then print it from your word processing application

The screenshot displays the 'TechAtlas for Libraries' web interface. At the top, a teal banner contains the title 'TechAtlas for Libraries' and a user profile link for 'Missouri State Library' with options for 'Profile' and 'Logout'. Below this is a navigation menu with tabs for 'Home', 'Planning' (which is active), 'Survey', 'Inventory', and 'Tools & Reports'. Under the 'Planning' tab, there is a sub-menu with links for 'Plan Years', 'Team', 'Mission & Vision', 'Goals & Objectives', 'Professional Development', 'Budget', 'Evaluate', 'Policies', and 'Download Technology Plan'. The main content area is titled 'Download Technology Plan' and contains instructions: 'Once you have completed your planning, you can use the links on the right to download a copy of your technology plan to your own PC. You can then use a word processing program to format, update, or print a copy of the plan.' It also states, 'You can also E-mail a link to the plan online for others to review.' To the right of this text are three download links: 'Download in MS Word Format (.doc)', 'Download in Rich Text Format (.rtf)', and 'E-mail Plan for Review'. Below the main content, there is a section for 'Missouri State Library' with the subtitle 'Technology Plan 7/1/2009 - 6/30/2012'. This section includes a 'Table of Contents' with links to various parts of the plan: 'A. Vision Statement', 'B. Mission Statement', 'C. Technology Inventory - Current and Projected', 'D. Goals and Objectives', 'E. Professional Development Strategy', 'F. Budget', and 'G. Evaluation Process'. The 'A. VISION STATEMENT' section is expanded, showing the text: 'The Vision of the Missouri State Library is: The citizens and public libraries of the State of Missouri, in and through their Missouri State Library, will have convenient access to library resources through proven technology and telecommunications. In the virtual and physical libraries, our role will be to provide value-added products and services that guide and direct customers to information and resources. Customers will be assisted as needed by a sufficient number of knowledgeable, trained staff who can help them make the best use of'.

Submitting the Technology Plan

- Print and complete these four things:
 - Technology Plan Update Form
 - Certification of Compliance Form (CIPA Filtering)
 - The Body of the Technology Plan
 - Budget showing Income and Expenses for the span of the three-year plan as an attachment

“Tools & Reports” Tab

Look through the Tools & Reports tab to review the:

- “Event Tracker” tool for tech support tracking
- “Reports” tool options
- “Computer Upgrade Wizard” that will evaluate your public access computers

The screenshot displays the TechAtlas for Libraries website interface. At the top, a teal banner reads "TechAtlas for Libraries". In the top right corner, it says "Missouri State Library" with links for "Profile" and "Logout". Below the banner is a navigation bar with tabs: "Home", "Planning", "Survey", "Inventory", and "Tools & Reports" (which is highlighted). Under the "Tools & Reports" tab, there is a sub-menu with links: "Event Tracker", "Reports", "Downloadable Plan", and "Computer Upgrade Wizard". The main content area is titled "Tools & Reports" and includes the text: "Use these tools to learn more about your existing technology assets." Below this is a table listing four tools:

➔ Event Tracker	A great tool for tracking technical support issues.
➔ Reports	A collection of tools to help you analyze your technology plan.
➔ Downloadable Technology Plan	Download or print your complete technology plan.
➔ Computer Upgrade Wizard	Evaluate your PAC computers against criteria established by your TechAtlas partners.

At the bottom of the page, there is a footer with links: "Home", "Help", "About Us", "Contact Us", and "© Powered by OCLC". On the right side of the footer is the "WebJunction" logo.

TechAtlas

- You can view other free tools available to libraries at:

<http://www.webjunction.org/1>

- Read about Spiceworks IT tool and download the software free through a link in the article at:

<http://www.webjunction.org/techatlas/articles/content/454275>

Other Technology Planning Resource Tools

- *Technology Made Simple: An Improvement Guide for Small and Medium Libraries* by Kimberly Bolan and Robert Cullin

Technology Essentials

- A Solid Network
 - Wiring and cabling
 - Hubs and Switches
 - Routers
 - Servers
 - Workstations
- A safe and reliable Internet connection

Technology Essentials

- Backup system
- Pest control: anti-virus, anti-spam, anti-spyware
- Data Storage Mechanism
- Web filters for CIPA compliance

Technology Essentials

- Printers and copiers
- Automated Catalog System: Integrated Library Systems
- Telecommunications
 - Telephones and other telecommunication devices based on a needs assessment

Technology Essentials

- Office Applications
 - Word processing
 - Spreadsheets
 - Desktop publishing
 - Presentation software
 - Financial tools
 - E-mail

Technology Essentials

- Online databases
 - Through the REAL program, the Missouri State Library pays for statewide access to a variety of online databases
 - Know what resources are available
 - Efficient and effective search skills
 - Trained staff to assist patrons with database use

Technology Major Considerations for Upgrade Goals

- Wireless access to the Internet
- Self-checkout system
- Assistive and adaptive technologies
- Print and time management solutions

Technology Major Considerations

- Advanced Web presence: a virtual branch
 - Remote access to catalog
 - Remote access to online databases
 - Offerings targeting special populations
 - Virtual reference
 - Inter-library loan participation

Technology Major Considerations

- Instant messaging
- E-books
- Online Training

Technology Innovations

- RFID (radio frequency identification)
- Blogs
- RSS feed
- Wiki
- Voice over Internet Protocol
- Podcasting
- Videoblogging

Technology Innovations

- Early Literacy Station
- Games and Gaming Center
- Audiovisual equipment and services
 - Listening and viewing stations
 - Picture/video-editing stations
- E-Video

Resources

- Bolan, Kimberly and Robert Cullin. *Technology Made Simple: An Improvement Guide for Small and Medium Libraries*. Chicago: American Library Association, 2007
- Gerding, Stephanie and Pam Mackellar. “Wishing Won’t Work: 10 Things You Need to KNOW and DO When Applying for TECHNOLOGY GRANTS.” *Computers in Libraries*, July/August 2006, Vol. 26, Issue 7, p. 6-60, 10 p.

Resources

- Minnesota Department of Education. *2004-2007 Technology Planning Guide for Minnesota School Districts, Charter Schools, Nonpublic Schools, and Public Libraries: 2004-2007 Planning Cycle*. Accessed at <http://education.state.mn.us/mde/static/003528.pdf>
- State Library and Archives of Florida, Library Development. *Technology Planning Made Easy*. Accessed at http://dlis.dos.state.fl.us/bld/Library_Tech/BLD_Tech_Plan.html

Resources

- State Library of North Carolina. *Technology Planning Instructions for Universal Service (E-Rate) Discount Eligibility: July 1, 2007 – June 30, 2010*. Accessed at <http://statelibrary.dcr.state.nc.us/hottopic/techplan/tplan07.doc>
- Stephens, Michael. “Technoplans vs. Technolust.” *Library Journal*. November 1, 2004. Accessed at <http://www.libraryjournal.com/index.asp?layout=articlePrint&articleid=CA474999>.
- Universal Service Administrative Company. *Develop a Technology Plan*. Accessed at <http://www.usac.org/sl/applicants/step02/>

Resources

- WebJunction. *TechAtlas*. Accessed at <http://www.webjunction.org/do/Navigation?category=13408>
- WebJunction. *WebJunction Pathfinder: Technology Planning*. Accessed at <http://www.webjunction.org/do/DisplayContent?id=12028>